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Gouvernement
du Canada

Federal Tourism Strategy **Annual Report**



2013

Canada

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Supporting Tourism

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Federal Tourism Strategy—2013 Annual Report

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Message from the Minister of State

I am pleased to present the second annual report on Canada's Federal Tourism Strategy. The report outlines the progress of some 20 federal departments and agencies on advancing the strategy's four priorities: increasing awareness of Canada as a tourist destination; improving visitors' access to Canada; encouraging development of new tourism products; and fostering an adequate supply of skills and labour for the tourism industry.

The results achieved so far speak to the success of the strategy's whole-of-government approach. As the second year under the strategy, 2013 saw a number of meaningful achievements, both inside and beyond Canada's borders.

I had the pleasure of leading a successful tourism mission to India in 2013, while our Government's Global Markets Action Plan identified tourism as a priority sector. In addition, we announced 26 new or expanded international air transport agreements—the most ever in a single year. Here at home, I was pleased to convene a meeting with my provincial and territorial counterparts to share perspectives on ways to enhance Canada's tourism competitiveness. The group discussed improving visitor access, marketing and tourism attraction development.

Our Government is taking these measures because we recognize the importance of this dynamic sector as well as the increased competition it is facing worldwide. To be successful, Canada's tourism industry must innovate and adapt to offer the compelling experiences travellers are seeking.

As Canada approaches its 150th anniversary in 2017, I am engaging with tourism stakeholders, Cabinet colleagues, and provincial and territorial counterparts to take advantage of this opportunity to showcase the country to the world and build up the tourism sector.

With the strategy as our guide, and working in partnership with industry, the Government of Canada is committed to strengthening the tourism industry for the benefit of all Canadians.

Maxime Bernier
Minister of State (Small Business and Tourism) (Agriculture)

Supporting tourism

Tourism makes an important contribution to the Canadian economy, with businesses large and small employing hundreds of thousands of workers in rural and urban communities across the country.

In 2013, tourism activities represented almost 2 percent of gross domestic product (\$33 billion). Tourism revenues grew to \$84.3 billion, which is 3.1 percent higher than the 2012 figure.

Contributing to this growth was an uptick in overnight trips to Canada. In 2013, non-residents made 16.6 million such visits, an increase of 1.5 percent from 2012. Canada witnessed notable increases in the number of overnight travellers from key inbound tourism markets, such as China (22.3 percent), Mexico (6.3 percent) and South Korea (3.3 percent).

The number of tourism jobs reached 618,100 in 2013, an increase of 1.4 percent from 2012.

Canada is a safe, prosperous and beautiful country and has much to offer as a tourist destination. In addition, travel and tourism encourage links and understanding between countries, enabling visitors to Canada to gain access to educational, investment and trade opportunities.

Through the **Federal Tourism Strategy**, the federal government strives to enhance its role as an effective partner with industry and other levels of government, in support of tourism.

Launched in 2011, the Federal Tourism Strategy is bringing greater coherence to federal policies and programs that support tourism. It formalizes a whole-of-government approach to facilitate the collaborative efforts of some 20 departments and agencies.

This report outlines accomplishments in the second year of the strategy in four priority areas:

1. increasing awareness of Canada as a premier tourist destination;
2. facilitating ease of access and movement for travellers while ensuring the safety and integrity of Canada's borders;
3. encouraging product development and investments in Canadian tourism assets and products; and
4. fostering an adequate supply of skills and labour to enhance visitor experiences through quality service and hospitality.

The work undertaken by federal departments and agencies sought to make Canada more competitive in the global tourism market, help tourism operators and destinations improve their offerings, and facilitate visitor access to Canada.

The Government of Canada is committed to supporting the tourism industry over the long term, as it leads the way in developing sustained growth. In this regard, this report highlights a variety of initiatives that will maintain the strategy's momentum in the years ahead.

1. Increasing awareness of Canada as a premier tourist destination

Partnerships and collaboration were the focus of federal initiatives in 2013 to enhance awareness of Canada's extraordinary tourism experiences. International missions, promotional campaigns and familiarization trips brought together federal departments and agencies—along with provincial and territorial governments, and industry stakeholders—to promote tourism to and in Canada.

Key accomplishments

Leading tourism missions

In February 2013, Maxime Bernier, Minister of State (Small Business and Tourism) (Agriculture), led a successful mission to New Delhi and Jaipur, India. The mission built on the Canadian Tourism Commission's (CTC's) ongoing work to promote Canada as a destination of choice for Indian travellers, a record number of whom came to Canada in 2013. Accompanied by industry stakeholders representing the Tourism Industry Association of Canada, Festivals and Major Events Canada, Brewster Inc., FRHI Hotels & Resorts, InterContinental Hotels Group, and Air Canada, the Minister of State attended the CTC's Focus Canada-India 2013. This annual business-to-business marketplace showcases Canadian tourism operators and attractions to Indian tourism buyers. The Minister also met with his Indian counterpart to discuss ways India and Canada can work together to facilitate mutual travel and trade, and with key Canadian and Indian tourism operators.

The Government of Canada also supported a mission to China led by the Tourism Industry Association of Canada. In October 2013, a group of Canadian tourism businesses travelled to China for meetings, workshops and events in Shanghai and Ningbo and also participated in the Showcase Canada-Asia Marketplace, hosted by the CTC in Hangzhou. This trip was funded in part through Foreign Affairs, Trade and Development Canada's Global Opportunities for Associations risk-sharing program.

Expanding promotional activities

The CTC, Canada's national tourism marketing organization, is a federal Crown Corporation and part of Industry Canada's portfolio. The CTC focuses its promotional activities on markets where Canada's tourism brand leads and yields the highest return on investment. It is currently invested in 10 international leisure markets (Australia, Brazil, China, France, Germany, India, Japan, Mexico, South Korea and the United Kingdom) and two business markets (Belgium and the United States). In 2013, the CTC undertook a number of initiatives to market Canada internationally in support of its goal of growing export tourism revenue.

Noteworthy international campaigns

The CTC team in China developed a travel competition television program called "Canada—You Can Be a Star" for telegenic Chinese couples and friends to explore Canada. Thousands of couples applied to win one of five spots to star in a 26-part television series on China's Travel Channel, as well as share their Canadian experiences via daily blog posts using text, images and videos. Almost all parts of Canada and a large selection of Canadian Signature Experiences were featured. The two seasons of the show (2012 and 2013) resulted in 100 million viewers, more than 15 million online views and 140 pages of print media.

The CTC South Korea team and Aurora Village in Yellowknife joined forces with a consortium of South Korean tour operators to promote travel to Northwest Territories, including viewing the northern lights, through a special television program on one of South Korea's main television networks. The program was paired with early-bird promotions offered by the five tour operators. As the show aired, "aurora" became the top-searched keyword in South Korea and tour operators sold 630 trips to this northern attraction from South Korea. Subsequently, 15 new companies offered high-end travel packages that featured the aurora experience. South Korean travellers often paired the trip with other Canadian destinations, such as the Rockies, Niagara Falls and Vancouver.

Social media inspiration

Social media is a key element of the CTC's overall marketing strategy and a cost-effective way to build awareness of and interest in visiting Canada. By leveraging social media channels, such as Facebook, Twitter, YouTube, Instagram and Tumblr, the CTC aims to inspire travellers to consider Canada as a travel destination.

The CTC joined with National Geographic Travel to take part in the 50 Places of a Lifetime campaign. Four award-winning photographers created stunning images from across the country to accompany original content, personal stories and travel itineraries. Consumers were also encouraged to share their stories of the 50 Canadian destinations through the CTC's and National Geographic Travel's Facebook, Instagram, Twitter and Google+ channels. The campaign was reinforced by CTC and partner ads and social media activities. The editorial was also translated for National Geographic Travel's Chinese website. Over three months, from October to December 2013, the campaign generated 12.5 million Twitter impressions under the #Canada50 hashtag, while the CTC's Google+ page visits grew from 500 to 50,000.

The CTC and provincial partners also hosted familiarization trips in 2013 for leading users of the social media tool Instagram. These visitors chronicled the landscapes of Yukon and Alberta and shared their photos and stories with their global networks. This innovative social media project drew viewers from 93 countries and generated 3 million Instagram likes and nearly 40,000 Instagram comments. Since the beginning of 2013, the CTC's following on Instagram (ExploreCanada) has grown from 12,000 to 50,000.

Bringing Canada's tourism businesses to international markets

The CTC works with tourism businesses to enable them to reach lucrative international markets through platforms such as direct-to-consumer advertising channels (broadcast, print, online), media events, and promotions through travel agents and tour operators.

In November 2013, the CTC added 28 tourism businesses to its Canadian Signature Experiences collection—a curated group of almost 200 travel experiences that reflect Canada's tourism brand. These exemplary experiences help Canada stand out in a crowded marketplace and better define its tourism offerings, from coast to coast to coast. Among the new entries are three experiences with Aboriginal cultural tourism content. International travel agents have greeted the collection with enthusiasm and are now incorporating these unique and compelling Canadian offerings into their packaging and promotional efforts. The CTC continues to support the collection through membership outreach and integrates experiences into the CTC's marketing and sales platforms.

Equipped with the CTC's latest research, the CTC's Explorer Quotient (EQ) provides consumer intelligence to help small businesses promote and sell their products and services in six markets (Canada, the United States, France, Germany, the United Kingdom and Australia). The CTC launched its refreshed EQ toolkit in September 2013. The toolkit shows businesses how to use EQ to maximize their marketing dollars.

Super-sized travel trade trip

In the fall of 2013, the CTC, in partnership with destination marketing organizations from across Canada, hosted its largest-ever familiarization trip to Canada for travel agents, tour operators and travel trade media from key international tourism markets. Over eight days, small groups fanned out across the country to various venues, with a focus on Canadian Signature Experiences. Participants then regrouped in Niagara Falls for tours of that area's famous attractions and a seminar, during which each group made a visual presentation for their colleagues on the province they had visited. All in all, 220-plus participants got a taste of the rich variety of adventures Canada has to offer. Through these first-hand experiences, these travel industry figures have become genuine ambassadors for Canada and can now knowledgeably recommend Canadian tourism experiences to their clients.

Rendez-Vous Canada

The CTC held its annual international tourism industry marketplace—Rendez-Vous Canada—in May 2013 in Ottawa. The 37th annual edition saw representatives from more than 1,000 Canadian tourism organizations meet nearly 400 buyers from 22 international markets to network and close business deals. The Minister of State (Small Business and Tourism) (Agriculture) participated in the event, which generates millions of dollars for Canada's tourism industry each year. The Minister will also attend Rendez-Vous Canada 2014, which will be held in Vancouver in May 2014.

Awards and honours for the CTC

The CTC's 35 Million Directors campaign, a made-by-Canadians invitation to the world to visit Canada, brought home four gold awards from the Canadian Marketing Association in 2013. In the consumer services category, the campaign won for the best use of digital, advertising, community engagement and integrated disciplines.

In October 2013, the CTC was inducted into the Palladium Balanced Scorecard Hall of Fame. This award recognizes the CTC's work to be strategy-focused in its efforts to promote Canada as a tourism destination of choice, execute its strategies successfully and achieve top performance results. The CTC is the seventh Canadian organization to receive this honour and joins more than 170 companies around the world in the Hall of Fame, the gold standard for strategic performance management.

Partnering to promote Canada

The Atlantic Canada Opportunities Agency (ACOA) works with a variety of partners to enhance tourism in the Atlantic provinces. Through the Atlantic Canada Tourism Partnership (ACTP), ACOA participates with the four provincial governments and four provincial tourism industry associations to penetrate international markets that are mostly inaccessible to the individual jurisdictions. ACTP intensifies Atlantic Canada's international tourism marketing efforts by generating marketing efficiencies at the consumer, travel trade and media relations levels. ACTP extends the reach, frequency and appeal of provincial tourism brands in the Mid-Atlantic and New England regions of the United States and delivers the regional "Atlantic Canada" brand to priority markets in the United Kingdom. ACTP participates in CTC research and overseas marketing activities in markets of common interest. In addition, the CTC is an *ex officio* member of ACTP's management committee.

ACOA and Canada Economic Development for Quebec Regions continued to collaborate to advance the competitiveness and economic benefits of the cruise ship industry in Atlantic Canada and on the St. Lawrence and Saguenay rivers. These agencies met to discuss their support and priorities for the cruise industry. They worked with industry members to create itineraries for passengers visiting port communities, develop marketing strategies and engage cruise lines.

Ensuring sound business practices

In November 2013, Industry Canada facilitated a round table of government and industry stakeholders on destination marketing programs. Under the programs, hotels charge guests fees that support marketing initiatives. At the meeting, Competition Bureau officials shared information with representatives from the Hotel Association of Canada and Tourism Industry Association of Canada about when and how charging these fees might violate the *Competition Act*, and about steps to take to avoid that. Bureau representatives also distributed written information on the topic to be shared with association members.

Maintaining the momentum

Recognizing that their mandates complement one another, the CTC, Foreign Affairs, Trade and Development Canada, and Industry Canada launched discussions in 2013 to identify areas in which they could collaborate more closely to enhance support for the Canadian tourism sector. The three organizations are determining ways to capitalize on their respective strengths with respect to international marketing, global trade and the Federal Tourism Strategy.

The CTC's **Business Events Canada** team has adapted its sales focus to align with the federal government's **Global Markets Action Plan**, announced in November 2013. The plan identifies 22 priority sectors, including tourism, in which existing capabilities and expertise provide Canada with a strong competitive advantage vis-à-vis other countries, or in which there are dynamic opportunities to grow and develop Canadian business.

Supporting Canada's trade agenda through tourism can be a vehicle for driving incremental trade and investment in Canada. Business tourism in particular stimulates future investment, since business travellers see first hand the potential for investment in a country while attending a meeting, conference or exhibition and may return later to establish business operations.

Business Events Canada was part of a group of tourism organizations that secured the TED Conferences for Vancouver-Whistler for both 2014 and 2015. These prestigious five-day events bring 1,200 of the world's best business minds and global thought leaders to Canada to focus on technology, entertainment and design—as well as science, business, the arts and global issues—and provide opportunities for them to get to know Canada. The March 2014 event marks TED's 30th anniversary. The conferences are held in Vancouver, with the associated TEDActive taking place in Whistler each year.

Pursuing youth as a travel segment is a current CTC priority. In 2014, the CTC plans to roll out a youth program to inspire a new generation of travellers to visit Canada. This program will provide Canada with travel marketing targeted specifically to youth, particularly Canadians, providing an important addition to the country's tourism marketing strategy. It will also serve as a starting point for appealing to international youth. The CTC formed the Youth Travel Council to provide advice on how to engage and attract young travellers. The Council's inaugural meeting was held in December 2013.

Parks Canada is renewing all its promotional materials as part of its efforts to take a strategic approach to promoting the products and venues it manages in 460 communities across the country. In 2013, the agency introduced its new "experience PROPER AWESOME" campaign, including new visitor experience products and promotional materials. Workshops were held at 12 pilot sites in the summer of 2013, with the industry launch at the Tourism Industry Association of Canada annual congress in Ottawa in December 2013. The campaign will be promoted to visitors starting in the spring of 2014.

2. Facilitating ease of access and movement for travellers while ensuring the safety and integrity of Canada's borders

Federal departments and agencies worked together in 2013 to reduce barriers to tourism. New and expanded air transport agreements were concluded, more visa application centres were opened around the world, and border operations were streamlined to facilitate the entry of visitors to Canada.

Key accomplishments

Air transportation

An ongoing federal priority is the negotiation of air transport agreements with countries around the world to facilitate travel. Foreign Affairs, Trade and Development Canada (DFATD) and Transport Canada work together to advance the Government of Canada's Blue Sky Policy, which calls for a proactive approach to the liberalization of air transport agreements. In 2013, the government announced 26 new or expanded international air transport agreements—the most ever in a single year. Among these were expanded agreements with China and Japan, two key sources of inbound tourists. These agreements will allow for higher frequency of flights to and from Canada, better access to key airports, and more flexibility for airline routing and pricing. All in all, these agreements will facilitate an increase in inbound tourism and offer more business opportunities for Canada's tourism industry.

Transport Canada, DFATD and the Canadian Transportation Agency meet regularly to develop the proposed calendar for air transport negotiations. Each year, Transport Canada also receives input on priorities for the negotiations from the Tourism Industry Association of Canada, airlines, airports and, via Industry Canada, provincial and territorial tourism officials.

The Minister of Transport regularly engages with industry and federal partners to better define concerns about the competitiveness of Canada's air transportation system and to establish an appropriate way forward to address these issues. Round-table consultations in 2013 included those with provincial and territorial ministries of tourism and the Tourism Industry Association of Canada.

Improved border experiences

For the 2013 cruise season, the Canada Border Services Agency (CBSA) streamlined and simplified the border clearance process for cruise ships. Ships arriving at their first port of arrival in Canada were fully cleared by the CBSA. No further clearance was required at subsequent Canadian ports, as long as the ships had not embarked or disembarked people or goods, or docked at a foreign port. CBSA tested these new procedures in 2013, and the government is expected to introduce legislative amendments in 2014 to formalize the new approach.

Canada continues to expand and enhance the NEXUS trusted traveller program. As of December 2013, NEXUS membership had topped 943,000. In addition, to speed up border crossings, NEXUS lanes and booths were expanded at the Peace Bridge (Fort Erie, Ontario); Pacific Highway (Surrey, British Columbia); Queenston-Lewiston Bridge (Queenston, Ontario); Lacolle, Quebec; and Windsor, Ontario.

As a means of facilitating the movement of business travellers and tourists, Canada, Mexico and the U.S. committed to establishing a North American trusted traveller program in 2014. As a first step, the three nations will mutually recognize their various existing trusted traveller programs, including NEXUS.

Enhanced visa services

Citizenship and Immigration Canada (CIC) reviews visa requirements on a country-by-country basis, taking numerous criteria into account and following extensive intergovernmental consultations. In 2013, the government lifted the visa requirement for visitors from the Czech Republic. Residents from 51 countries do not require a visa to visit Canada.

The demand for visas continues to grow, however. Canada is increasingly issuing multiple-entry visas to facilitate the travel of frequent visitors. CIC has introduced an online application system that makes it easier and quicker for visitors, businesspeople and students alike to apply for a visa to travel to Canada.

In Budget 2013, the government announced funding to meet the growing demand for visas. The additional funding is supporting enhanced visa processing capacity, so visitors, including tourists, can get their visas more quickly.

Private companies operate Canadian visa application centres (VACs) overseas. In keeping with Canada's commitment to improve service for applicants, CIC has increased the number of VACs around the world. The global expansion of the VAC network is making the visa application process easier and more accessible through extended hours of operation and in-person access not available at most visa offices.

As of December 2013, there were 127 VACs operating in 92 countries, up from 60 VACs in 2012.

Under the terms of their contracts, the third-party service providers operating the VACs have been displaying Canadian tourism information, including posters and video advertisements from the Canadian Tourism Commission (CTC). CIC will continue to work with the contractors, Industry Canada and the CTC to assess any proposals to offer additional value-added services for the promotion of tourism products in the VACs. During the February 2013 mission to India, the Minister of State (Small Business and Tourism) (Agriculture) visited the VAC in New Delhi.

VACs are also the primary service channel for biometric enrolment overseas, making it more convenient for applicants to provide their fingerprints and have their photo taken. As of December 2013, nationals of 29 countries and 1 territory (none of which are major inbound tourism markets) must appear in person to do so and pay a new biometric fee when they apply for a temporary resident visa, work permit or study permit. By June 2014, all the VACs in CIC's network will be equipped to collect biometrics. In the United States, biometrics can also be provided at 135 special-purpose Application Support Centres.

The use of biometrics as a screening tool in CIC's temporary resident program helps visa officers confirm applicants' identity with a higher level of certainty immediately upon their arrival in Canada and helps facilitate travel of legitimate repeat travellers. It also protects the safety and security of Canadians by helping to prevent inadmissible individuals from entering the country.

The expansion of the VAC network is helping mitigate the impact of the rollout of biometrics by offering applicants better access to visa application handling services.

In key tourism markets, including China, Mexico and India, CIC has implemented, in consultation with the CTC, initiatives aimed at streamlining and expediting visa applications for low-risk travellers submitted through preferred travel agents. Similarly, the new CAN+ program targets repeat travellers to North America from China. Expedited service is available to approved visitor visa applicants who have travelled to Canada and/or the United States within the past 10 years. The program is being expanded in Mexico in 2014 and could be expanded to other countries, should local circumstances warrant it.

The Business Express Program has been implemented in China, India, Mexico and Chile. Applicants under this program are issued multiple-entry visas, creating an incentive for them to consider additional travel to Canada. Visas are issued within days under the program, with an approval rate of close to 100 percent.

Maintaining the momentum

Canada and the United States issued their second annual ***Beyond the Border Action Plan Implementation Report*** in December 2013. This report outlines the solid progress made by the two countries to implement the Beyond the Border Action Plan—an agreement to enhance mutual security, prosperity and economic competitiveness.

An important aspect of the work under the plan is facilitating cross-border business to ensure that travellers benefit from more efficient and predictable border clearance processes. Both countries have enhanced their training and guidance manuals for border officers to improve the consistency of border determinations. In addition, Canada and the U.S. now hold annual joint consultation sessions with stakeholders from both countries to seek additional ideas on facilitating business travel. Consultations were held in December 2013 in Bellingham, Washington State, and Vancouver, British Columbia.

Canada and the United States released the first joint **Border Infrastructure Investment Plan** in May 2013. The objective of the plan is to ensure a mutual understanding of recent, ongoing and planned border infrastructure improvements. In this document, Canada also confirmed its investment plans for key border crossings.

Over the course of 2013, the Government of Canada announced significant infrastructure upgrades at four ports of entry: Lacolle, Quebec; Lansdowne, Ontario; Emerson, Manitoba; and North Portal, Saskatchewan. These investments will expand and modernize infrastructure at these four priority border crossings and help travellers and trade move faster between the United States and Canada. Construction is scheduled to begin at Lacolle and Lansdowne in 2014.

Transport Canada, the Canada Border Services Agency and other federal partners continued to work with their American counterparts through the Border Wait Time Working Group to determine at which border crossings to implement wait-time technology, based on vehicle volumes, historical delays and the proximity to other crossings (to which traffic could be diverted). These discussions led to the approval of federal funding in November 2013 for the deployment of border wait-time measurement technology at the remaining 14 high-priority crossings.

In Budget 2013, the Government of Canada announced three-year funding to advance the Windsor-Detroit International Crossing project to secure safe and efficient access to Canada's busiest border crossing, which is critical to the movement of people, including tourists, and goods to market. The new Rt. Hon. Herb Gray Parkway—an 11-km-long, six-lane, below-grade highway—will connect Highway 401 to the bridge and facilitate the movement of vehicles by eliminating more than a dozen traffic lights that exist on the current route. It is anticipated that the Parkway will be open to traffic in late 2014.

3. Encouraging product development and investments in Canadian tourism assets and products

In 2013, federal departments and agencies worked to develop new products and services to help enhance Canada's tourism destinations, including national parks and historic sites. The government also supported projects in anticipation of significant milestones, such as Canada's 150th anniversary in 2017, and international sporting events, including the Toronto 2015 Pan American and Parapan American Games.

Key accomplishments

Analysis of the potential role of signature attractions

Industry Canada hosted a **stakeholder-partner forum** in February 2013 to share and discuss the **results of a study** on the role strategically important destinations and attractions play in stimulating tourism growth. Representatives from federal departments, all provinces and territories, and the tourism industry met to examine the key characteristics of these destinations and attractions, which include hubs and gateway cities. Forum participants also discussed the role of signature attractions and destinations in economic growth, branding and repeat visits, and shared best practices. The Minister of State (Small Business and Tourism) (Agriculture) attended the gathering to meet with participants and speak about the work being done under the Federal Tourism Strategy.

Aboriginal tourism

Aboriginal Affairs and Northern Development Canada (AANDC) supported the work of the Aboriginal Tourism Marketing Circle (ATMC)—a group of regional Aboriginal tourism associations and destination marketing organizations—to develop Aboriginal tourism opportunities. For example, the ATMC launched a national manual for developing Aboriginal cultural experiences in May 2013. The manual includes valuable information on Aboriginal tourism, checklists and best practices—all to help organizations create and deliver market-ready and authentic Aboriginal cultural tourism products.

AANDC also worked with private sector organizations to put on the 2013 Aboriginal Entrepreneurs Conference and Tradeshow, which took place in Gatineau, Quebec, in November. The event included a moderated panel on Aboriginal tourism development. The discussion focused on some of the themes addressed in the manual, including the importance of integrating cultural components into Aboriginal tourism experiences. The panel featured lively interactions between established operators and those looking to explore the potential of Aboriginal tourism as an economic driver.

AANDC provided support in 2013 for an ATMC study to identify Aboriginal tourism opportunities in the cruise industry.

Parks activities

Over the course of 2013, Parks Canada laid the groundwork for allowing tourism and other stakeholders to advertise in Parks Canada publications, such as national park visitor guides. The intention is to increase production runs for these publications and generate greater awareness of the products and services available in and around Parks Canada locations. The agency plans to propose the required policy changes in 2014.

To increase the number of visitors to national parks and broaden the range of visitors, Parks Canada continues to diversify the types and price points of the accommodations it offers. It introduced the oTENTik—a tent-like structure featuring an elevated wood floor, wood stove, outdoor deck and lighting—in 2012. The agency erected 100 more of these cabin tents in 2013, for a total of 120 in 12 national parks and 2 national historic sites, and saw 80-percent occupancy rates over the year. Parks Canada expects to install more units in 2014.

Through modern communications technology, Parks Canada is bringing its offerings to a wider audience:

- Explora is the latest Parks Canada app for mobile devices. Following Explora's guided tours, visitors can experience the history, sights and sounds of Canada's national parks and historic sites at their own pace.
- Potential visitors the world over can now virtually explore Canada's national heritage places using Google Street View. In 2013, more than 50 national parks and historic sites were captured and are now available for viewing. More locations will be covered in 2014, and Google will train Parks Canada staff to capture remote northern sites.
- Parks Canada co-hosted the Quietest. Concert. Ever. in Banff National Park in October 2013. More than 750 fans listened to the concert by the band Hedley through wireless headphones. This pilot project was intended to develop a new Parks Canada concert experience targeting young adults and featuring Canadian talent. The event garnered roughly 250,000 further exposures through Canadian Broadcasting Corporation radio and television broadcasts and was accompanied by an extensive social media campaign that introduced young audiences to Banff National Park and Parks Canada. The agency expects to host another concert in 2014.

Canada's national park system—one of the country's best-known tourist attractions—continued to grow and develop in 2013. In fact, the birthplace of the network of parks and historic sites, Cave and Basin National Historic Site, re-opened in May 2013 after a three-year renovation. Interactive displays and exhibits show the growth and development of Canada's national parks since their beginning in 1885. The site also features naturally occurring, warm mineral springs in a cave and an emerald-coloured basin.

Sable Island was officially declared a national park reserve in December 2013. Located off the coast of Nova Scotia, Sable Island is renowned for its shipwrecks, sand dunes and wildlife, including the endangered roseate tern and roughly 500 wild horses. The management team for Canada's 44th national park is in place and will begin welcoming visitors in June 2014.

In June 2013, the Red Bay Basque Whaling Station in Labrador was named Canada's 17th UNESCO World Heritage Site. The station is the largest and most complete example of an early industrial-scale whaling site in the world and is a National Historic Site managed by Parks Canada.

Also in June 2013, the Royal Astronomical Society of Canada designated Wood Buffalo National Park as a Dark-Sky Preserve, the first northern park to be so recognized. The park straddles the Alberta–Northwest Territories boundary and is the largest national park in Canada. With an area of 44,807 km², it is also larger than all the other dark-sky sites in the world combined.

Construction of the new Glacier Skywalk on the Icefields Parkway in Jasper National Park was largely completed in 2013. It will be open to the public in 2014.

Cultural, heritage and sport programming

Federal agencies continue to bring the events and people of the War of 1812 to life, as part of the ongoing commemoration of the 200th anniversary of the conflict. Parks Canada's 1812 on Tour is a travelling visitor experience being featured at festivals, events and re-enactments from coast to coast. In two years, the tour has stopped in 39 locations, entertaining and educating more than 95,000 people about the war. Tour staff also take the opportunity to let visitors know about Canada's network of national parks and historic sites. Parks Canada has enhanced interpretation, programming and facilities related to the war at national historic sites across the country.

Through the 1812 Commemoration Fund, Canadian Heritage supported many projects across Canada in 2013, such as Water's Edge Festivals & Events' Tall Ships 1812 Tour, which visited Toronto in the summer of 2013. This event attracted more than 1 million visitors. Canadian Heritage also supported 31 community-based projects. For example, Building Communities through Arts and Heritage supported the Alderney Landing Association's commemoration of the War of 1812 from June to September 2013 in Halifax. Activities included concerts featuring music from 1812, historical symposiums, and art and theatre camps.

Canadian Heritage now communicates the benefits of tourism to its stakeholders and has posted information on its [website](#) encouraging stakeholders and partners to use Canadian Tourism Commission resources to build skills and capacity related to tourism.

Angling and hunting

The second meeting of the federal Hunting and Angling Advisory Panel took place in May 2013, with the ministers of Environment and Fisheries and Oceans in attendance. The panel provides advice to the Government of Canada on federal policies, programs and activities related to conservation and hunting, trapping and angling—activities with connections to and a presence in tourism. In December 2013, two new organizations—outfitters from Nunavut and the Northwest Territories—were invited to join the panel.

Regional development

The Federal Economic Development Initiative for Northern Ontario (FedNor) launched its initiative to deliver a tailored version of the Atlantic Canada Opportunities Agency's (ACOA's) tourism curriculum, *Vision in Steering Intelligent Tourism (VISIT)*, in Northern Ontario. By adopting VISIT, FedNor aims to give its economic development personnel the knowledge and tools they need to work more closely and effectively with tourism businesses and rural communities to identify and advance strategic tourism investment opportunities. FedNor is hosting VISIT sessions in Sudbury in 2014.

By the end of 2013, ACOA had introduced its Strategic Tourism Expansion Program (STEP) in 10 communities in Atlantic Canada. STEP supports destination development throughout the region. Capitalizing on each community's inherent strengths and unique selling points, STEP guides these communities through the process of creating and executing strategic and sustainable tourism action plans.

From 2008 to 2013, Canada Economic Development for Quebec Regions (CED) funded upgrades of port facilities to accommodate large cruise ships and to enhance tourist attractions in communities on the St. Lawrence and Saguenay rivers. Among the funded projects were the development of a port of call for cruise ships in Sept-Îles, the renewal of the tourism offering of the Musée du Fjord in Saguenay, and the purchase of tour buses by a company offering guided tours and a shuttle service to and from cruise ships arriving at the Îles-de-la-Madeleine port of call. Over the five-year funding period, CED supported more than 50 projects.

In 2013, Western Economic Diversification Canada (WD) supported initiatives to enhance awareness of Western Canada as a tourist destination and promoted community growth through the development and preservation of tourism attractions and infrastructure. WD also supported upgrades to local tourism infrastructure and initiatives through the Community Infrastructure Improvement Fund. Funded projects included upgrades to the Fraser River Heritage Park in Mission, British Columbia, and to Fort Edmonton Park and the historic High Level Bridge streetcar line in Edmonton. Through the fund, WD also contributed to improvements to the efficiency and accessibility of the Arlington Beach Camp and Conference Centre, in Saskatchewan, and to upgrades at the Manitoba Children's Museum in Winnipeg.

Federal organizations continued to support the development of potential tourism opportunities in official language minority communities (OLMCs). In 2013, Industry Canada provided support to Le Réseau de développement économique et d'employabilité Canada (RDÉE Canada) and the Community Economic Development and Employability Corporation to develop tourism strategies for OLMCs.

In October 2013, the Canadian Tourism Commission signed a memorandum of understanding with RDÉE Canada to support tourism in francophone and Acadian communities across Canada.

Employment and Social Development Canada renewed the Enabling Fund for OLMCs until March 31, 2018. This fund supports 14 organizations from two networks of French- and English-speaking minority communities that provide ongoing professional support in the areas of community economic and human resource development. The tourism sector continues to be at the centre of economic diversification efforts for a number of OLMCs. Organizations are leading efforts to showcase and market their communities' unique cultures and to capitalize on the economic development and employment opportunities associated with tourism.

The Business Development Bank of Canada (BDC) supported more than 3,200 tourism businesses in all regions of Canada in 2013. BDC's tourism-related financing activities accounted for 12.2 percent of its total loans portfolio. As of December 2013, BDC had more than \$2.5 billion committed to the tourism industry, representing an 11.5-percent increase from the previous year.

Maintaining the momentum

The year 2014 marks the start of the three-year countdown to Canada's 150th birthday in 2017. In anticipation, Canadian Heritage launched public consultations—cross-Canada round-table discussions and an online questionnaire—in 2013 on how to mark this significant milestone. A federal-provincial-territorial working group will facilitate collaboration between Canadian Heritage and the provinces and territories on initiatives and help establish partnerships across all jurisdictions.

In 2014, Prince Edward Island will celebrate the 150th anniversary of the 1864 Charlottetown Conference, which, along with the Quebec Conference, led Canada to Confederation. Canadian Heritage and the Atlantic Canada Opportunities Agency are funding major capital improvements to Charlottetown's Confederation Centre of the Arts, which opened in 1964 as Canada's national memorial to the Fathers of Confederation. This project will help improve the centre's capacity to offer performing arts and heritage programming and be instrumental in providing the necessary infrastructure to further develop cultural tourism in P.E.I.

The Government of Canada helped establish the Toronto 2015 Sport Legacy Fund to support the post-games operation and capital maintenance of three key facilities: the Pan Am/Parapan Am Aquatics Centre and Field House; the Milton Pan Am/Parapan Am Velodrome; and the Pan Am/Parapan Am Athletics Stadium at York University. The Sport Legacy Fund will help ensure Canadians will be able to use these venues and benefit from sport programming well beyond the Toronto 2015 Pan Am and Parapan American Games. The Fund will also help make Toronto and the Greater Golden Horseshoe a destination for tourism through the hosting of international sport competitions.

The Government of Canada will maximize the impact of the Games through the Federal Cultural Strategy to celebrate Canadian culture, history, heritage and official languages, while showcasing Canadian values and enhancing engagement in the Americas. Under the strategy, the government will support the Games' Community Celebrations Fund, invest in the Games Celebration Venue in Toronto and support the torch relays leading up to the Games.

Through advocacy activities by Canada's extensive network of missions, Foreign Affairs, Trade and Development Canada is raising awareness of the Games, while promoting Canada's engagement in the Americas.

Complementing these efforts is work by the Canadian Tourism Commission (CTC) to inspire visitors to come to Canada for the Games and the FIFA Women's World Cup, which will also take place in 2015. The CTC will use its social media platforms to engage potential visitors and highlight the events through activities targeted directly at consumers.

The Canadian Museum for Human Rights, one of Canada's new national museums situated outside the National Capital Region, is set to open in Winnipeg in September 2014. The Museum comprises more than 4,400 m² of exhibit space connected by nearly 1 km of bridges leading visitors to the Tower of Hope, a 23-storey glass structure. The museum is expected to attract visitors from across Canada and from other countries, and help brand The Forks in Winnipeg as a signature destination.

The Government of Canada is contributing to the revitalization of urban spaces, which are important tourist draws. For example, through Infrastructure Canada, the government is investing in the renovation of the RBC Convention Centre in Winnipeg. The updated facility, which will also see a significant expansion, is expected to attract more events when it opens in 2016 and contribute to the revitalization of Winnipeg's downtown.

Similarly, the new Art Gallery of Saskatchewan, with funding from Infrastructure Canada, will be a vibrant community gathering place and will distinguish Saskatoon as an art destination. With exhibition space three times that of the current facility and expanded public programming, the gallery, which is expected to open in 2016, will be part of a cluster of cultural attractions in downtown Saskatoon.

To capitalize on the largely untapped economic potential of tourism in Canada's North, Parks Canada is working with federal and territorial organizations, northern communities and Aboriginal tourism industry leaders to develop a northern tourism strategy. The strategy will focus on guided iconic experiences for groups at Canada's 14 northern national parks and 8 national historic sites, starting in 2015. Under the strategy, Parks Canada will seek to increase collaboration with partners to improve transportation access to these locations, expand the target market by providing accommodation and food services, and increase the connection of visitors to the North through interactions with northern peoples.

4. Fostering an adequate supply of skills and labour to enhance visitor experiences through quality service and hospitality

A skilled and adaptable labour force is crucial to the success of Canada's tourism industry. The federal government continued to support both employers and workers in 2013 through various projects that help tourism businesses find the employees they need and that help workers to develop the skills to excel in the workplace.

Key accomplishments

National recognition

The Minister of State (Small Business and Tourism) (Agriculture) participated in the Hotel Association of Canada's annual conference in February 2013. In his remarks at the association's Centennial Celebration and Hall of Fame Awards of Excellence Dinner, the Minister spoke about the importance of the hotel industry to tourism in Canada and acknowledged the "hardworking men and women in the tourism industry who make exploring our country an unforgettable experience for visitors."

Parks and employee certification

Parks Canada has been providing professional development training to its interpretation staff to ensure quality visitor experiences. It will be reviewing its approach to certifying interpreters to ensure it meets the needs of its various national parks and historic sites.

Support for employers and workers

Employment and Social Development Canada (ESDC) invested, over a period of 48 months, in a large-scale demonstration project on workplace literacy and essential skills training. The UpSkill project, the first of its kind, sought to uncover the most reliable measures of the impacts of literacy and essential skills training on workers' skill levels and job performance in the tourism sector. Delivered by the Social Research Demonstration Corporation, the project also provided training for 727 low-skilled Canadians in 88 companies across 8 provinces. It demonstrated a return on training investment for workers and employers in a number of areas, including increased job retention, improved customer relations and increased productivity. These, in turn, led to lower hiring and labour costs, and increased revenues.

Through grants for Red Seal apprentices, ESDC aims to encourage young Canadians to consider the skilled trades as a rewarding career choice. In 2013, more than 2,800 Apprenticeship Grants and Apprenticeship Completion Grants were issued to cooks and bakers, who are critical to the tourism sector. Advertising for the Red Seal program is ongoing, with a recent campaign beginning in December 2013.

ESDC supported a Canadian Tourism Human Resource Council (CTHRC) project completed in 2013 that focused on providing qualifications assessment and skills upgrading resources for skilled immigrants working in tourism. The project also sought to improve the mobility of workers and learners across Canada, and facilitate foreign credential recognition. Among the resources developed were qualification frameworks for key occupations in tourism and hospitality, an inventory of relevant job-readiness programs in Canada for skilled immigrants in tourism, and an online tourism orientation kit for community-based service providers and employment counsellors. As a result of the project, tourism employers are better able to recruit and retain skilled immigrants to meet their tourism workforce needs.

ESDC continues to provide support for Aboriginal people, older workers and youth to find employment and enhance their skills, including in the tourism sector.

Through the Aboriginal Skills and Employment Training Strategy (ASETS), ESDC funds a network of 85 Aboriginal employment centres with more than 600 points of service that deliver human resource development programs and services targeted to the needs of Aboriginal clients and labour market partners. Service delivery organizations have the flexibility to adapt their training to respond to local labour market needs, including those of the tourism sector.

Through the Skills and Partnership Fund, a partnership-based, opportunity-driven fund, ESDC supports projects aimed at encouraging innovation and partnerships, testing new approaches to the delivery of employment services, and addressing systemic gaps in service delivery. In the tourism sector, the Aboriginal Cultural Ambassadors project aims to create a comprehensive cultural tourism program to prepare Aboriginal people for employment opportunities in the sector. When completed, this 29-month project, along with the Navigating Employment Pathways project of the Métis Nation of Ontario (36 months), will have provided skills development and training-to-employment opportunities to approximately 300 Aboriginal people in Ontario in the tourism sector.

The Targeted Initiative for Older Workers (TIOW) is a federal-provincial-territorial cost-shared initiative designed to provide support to unemployed older workers (normally between the ages of 55 and 64) living in small vulnerable communities affected by significant downsizing and/or high unemployment. Several TIOW projects delivered by the provinces and territories are either geared toward, or include a training component to address, employment in the tourism industry. For example the Sir William Ford Coaker Heritage Foundation Inc. project in Trinity, Port Union, Elliston, Old Bonaventure and Bonavista, Newfoundland and Labrador, provided 11 unemployed older workers with 22 weeks of training, employment assistance services and work experience in the tourism industry—as tour guides, set designers and craft shop operators.

Through the Youth Employment Strategy (YES), the Government of Canada helps youth between the ages of 15 and 30 get the information and gain the skills, job experience and abilities they need to make a successful transition to the workplace. In 2012-2013, ESDC undertook more than 1,000 YES projects in the tourism sector. For example, as part of Canada Summer Jobs, youth gained job experience in a number of areas, including canoe instruction through Western Arctic Canoe North Adventure in the Northwest Territories and sales experience with the Arctic Closet in Nunavut.

The Atlantic Canada Opportunities Agency introduces tourism operators to new and innovative business practices. In 2013, it launched the Accelerated Market Readiness (AMR) program. Through AMR, tourism operators meet with an independent tourism expert to determine whether their operations are ready for market, with a specific focus on product development and promotional activities, and receive a property site visit from the expert to evaluate service standards. ACOA has delivered the AMR program to 170 small tourism businesses in 14 communities and tourism regions across Atlantic Canada.

Moving forward with a whole-of-government approach

Tourism plays an important role in helping the government support communities and create jobs. Complementing the work of the provinces and territories, federal departments and agencies invest substantially in projects, programs and activities that benefit the tourism sector. However, there are limits to what these organizations can achieve individually.

Under the auspices of the Federal Tourism Strategy, Industry Canada leads a whole-of-government approach to tourism. Some 20 federal departments and agencies examine their activities through a tourism lens and regularly collaborate to provide effective support to Canada's tourism sector.

A steering committee of senior federal executives meets multiple times each year to oversee the strategy's implementation. Among the goals of these meetings are ensuring a better understanding of tourism issues; sharing knowledge about federal initiatives that affect tourism in order to foster greater coherence and effectiveness in decisions; and enhancing connections and dialogue among departments and agencies, and with industry.

The committee continued its work at three meetings in 2013. Members shared information on various federal initiatives they have undertaken to address the evolving needs of the tourism sector. They also explored opportunities for collaboration, to make more effective use of resources and become better partners with industry. Ongoing dialogue among the departments and agencies aims to reduce barriers that impede the growth of tourism and to explore avenues for cooperation.

Industry stakeholders participated in the June 2013 steering committee meeting, which focused on the importance of partnerships to the growth of the industry. This session followed two similar meetings in 2012 and provided the opportunity for additional stakeholders to contribute to the dialogue. Industry representatives were also part of discussions with federal partners and provincial and territorial officials at a February 2013 forum on destinations and attractions. Participants at the event emphasized the importance of working together for success.

The second annual Tourism Research Forum was also held in June 2013, co-chaired by Industry Canada and the Canadian Tourism Commission, and attended by 13 federal departments and agencies. This gathering provided participants with the opportunity to share their organizations' tourism-related statistical measurement and monitoring activities.

The federal government will continue to build on its efforts in 2014 to facilitate new partnerships and develop more effective ways to contribute to the success and strength of the sector.

Appendix: Federal tourism partners

The following departments and agencies are members of the Federal Tourism Strategy steering committee:

- Aboriginal Affairs and Northern Development Canada
- Atlantic Canada Opportunities Agency
- Business Development Bank of Canada
- Canada Border Services Agency
- Canada Economic Development for Quebec Regions
- Canada Revenue Agency
- Canadian Heritage
- Canadian Northern Economic Development Agency
- Canadian Tourism Commission
- Citizenship and Immigration Canada
- Employment and Social Development Canada
- Environment Canada
- Federal Economic Development Agency for Southern Ontario
- Department of Finance Canada
- Foreign Affairs, Trade and Development Canada
- Industry Canada
- Infrastructure Canada
- Parks Canada
- Transport Canada
- Western Economic Diversification Canada

Many other Government of Canada organizations carry out tourism-related mandates, including the national museums and galleries, VIA Rail Canada, and Statistics Canada.